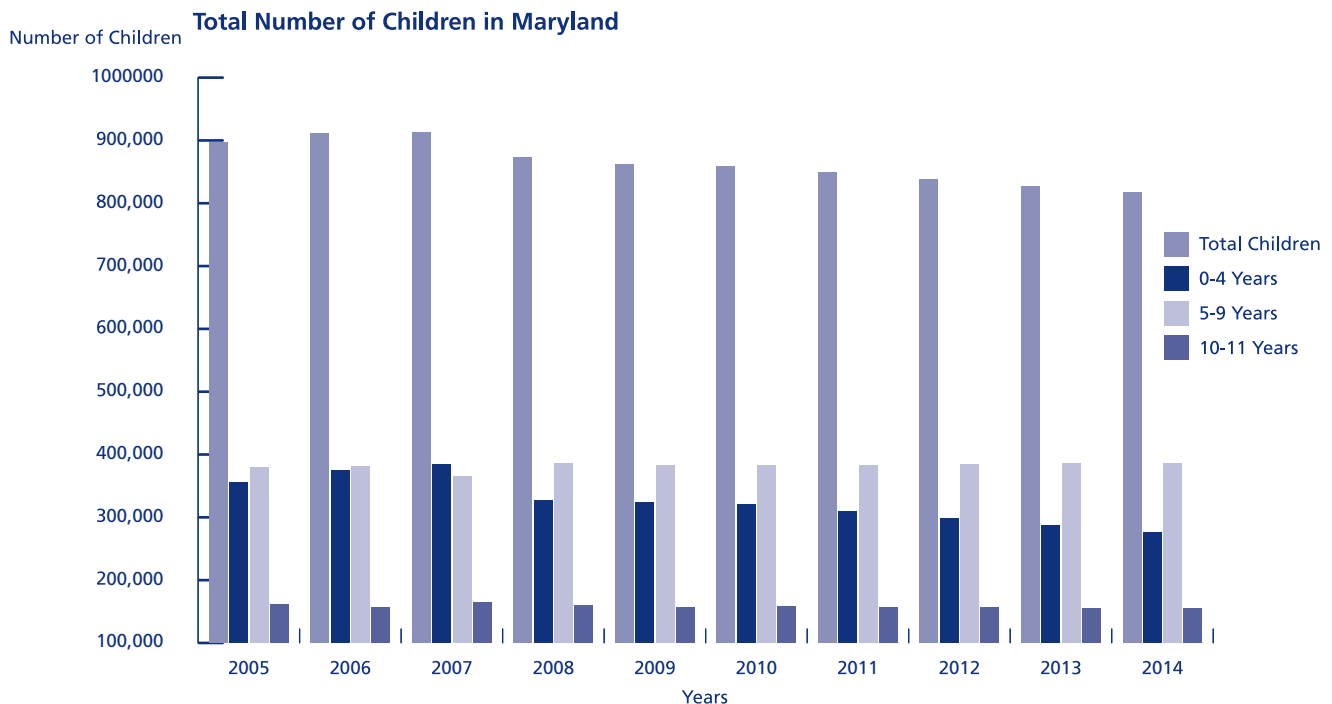# 2010 trends
in child care

How many children in Maryland will need child care in the future?

In Maryland, 75% of children under age 12 – more than 610,000 children in 2014 – may require child care while their mothers are at work.

Total Number of Children in Maryland

Number of Children

This publication provides a summary of the critical components of child care (demand, supply, and cost) from 2005 to 2014. The analysis is based on the data collected by LOCATE: Child Care of the Maryland Committee for Children and the Maryland Child Care Resource Network. The historical data collected from 2005 to the present is analyzed in the following summary and is used to project the data forecasts for 2010 through 2014 using Cycle Regression Analysis. The results of the analysis are presented through a combination of graphs, charts, and text descriptions that summarize the data and interpret the trends.

The chart above shows the total number of children in Maryland and groups them into the indicated age ranges. The chart indicates the data collected to date and projects the size of the population from which the future need for child care will come. It is estimated that 75%

of the total population of children under the age of 12 have mothers in the work force and may require child care.

Analysis of the data provides the following trends:

- The number of children in the 0-4 age group is projected to decrease by about 13.7% from 2010 through 2014.
- The number of children in the 5-9 age group is projected to increase by about 1.1% from 2010 through 2014.
- The number of children in the 10-11 age group is projected to decrease by about 1.9% from 2010 through 2014.
- The total number of children under 12 in Maryland is projected to decrease by about 5.0% from 2010 to 2014.

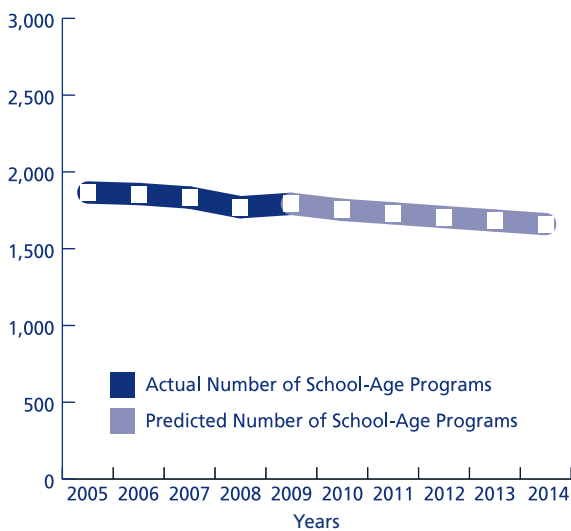# How many child care providers will there be in Maryland in the future?

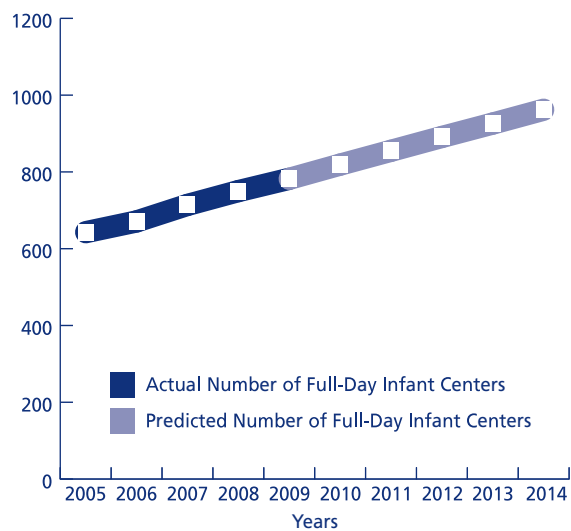## Number of Family Child Care Providers in Maryland

Years

- Actual Number of Family Child Care Providers
- Predicted Number of Family Child Care Providers
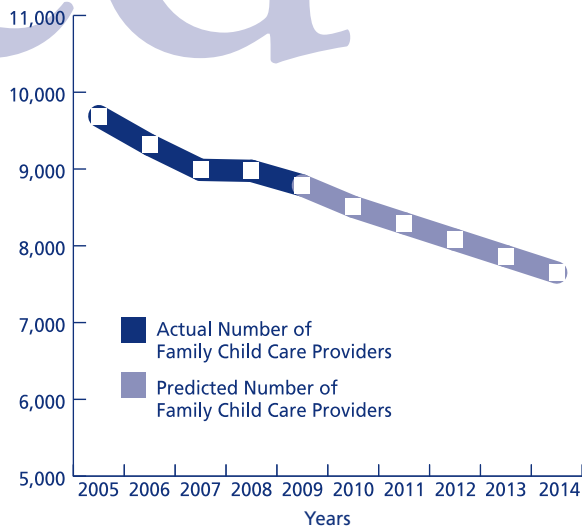
Number of Center-Based Programs in Maryland

Years

- Actual Number of Center-Based Programs
- Predicted Number of Center-Based Programs
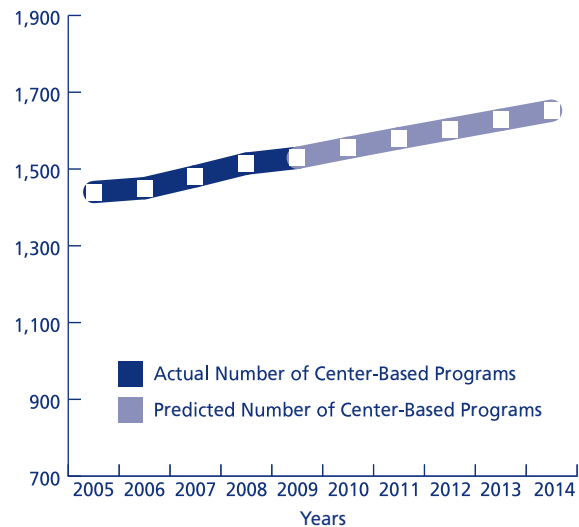
Number of School-Age Programs in Maryland

Years

- Actual Number of School-Age Programs
- Predicted Number of School-Age Programs

Number of Full-Day Infant Centers in Maryland

Years

- Actual Number of Full-Day Infant Centers
- Predicted Number of Full-Day Infant Centers

The graphs above depict the number of licensed child care providers in the state of Maryland, including both family providers and center-based programs. Separate graphs indicating the number of school-age programs and full-day infant care are also provided. The graphs indicate the actual numbers collected to date and show projections based on this information for the near future.
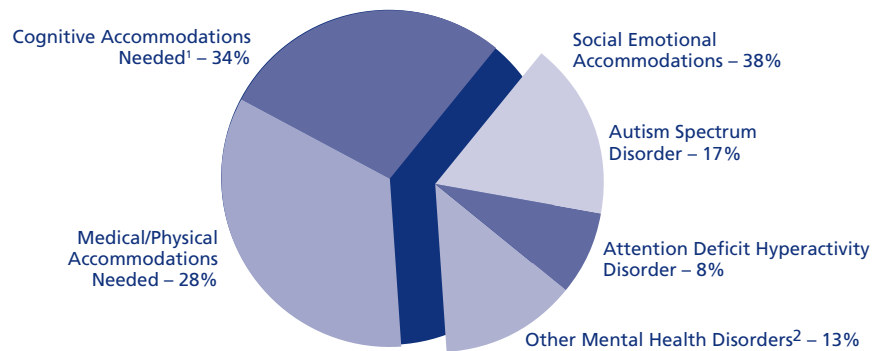
As shown in the first graph, the number of family child care providers in Maryland shows a projected decrease of about 10% from 2010 to 2014. Over this same period, the number of center-based programs shows a projected growth of slightly more than 6%.

The second pair of graphs depicts the growth of school-age programs and full-day infant centers in Maryland. The number of school-age programs has been relatively stable until 2007, but decreased in 2007 and is projected to continue to decrease by 5% from 2010 to 2014. The number of full-day infant centers has grown at an extremely rapid rate from 2005 to the present and is expected to grow by over 17% into the year 2014.

Is there a need for child care that can serve children with social/emotional disorders?

The need for child care for children with special needs is substantial, and children with emotional and social disorders comprise a large segment of the population in need of these services.

Accommodations Needed by Children with Special Needs Served Through LOCATE: Child Care

Cognitive Accommodations Needed[1] – 34%

Social Emotional Accommodations – 38%

Autism Spectrum Disorder – 17%

Medical/Physical Accommodations Needed – 28%

Attention Deficit Hyperactivity Disorder – 8%

Other Mental Health Disorders[2] – 13%

[1] Numbers include children with developmental delays as well as those with social/emotional disorders. Children with developmental delays often need social/emotional accommodations in the child care setting.
[2] Includes such conditions as depression, obsessive compulsive and other emotional disturbances.

In 2009, LOCATE: Child Care's Special Needs Service provided enhanced child care resource and referral services to the families of 950 children with special needs. The demand for these services was greatest for young children – from birth to age six.

A majority of the 950 children served (65%) were under the age of six. Only 8% of services related to children age twelve to twenty-one. Sixty-six percent (66%) of children served by LOCATE's Special Needs Service had a single disability while 34% had multiple disabilities.

Many children with a disability need some accommodation in child care settings. In earlier years, LOCATE had noticed a significant number of children needing social/emotional accommodations. Since 2006, the percentage of children needing social/emotional accommodations has leveled in the upper 30s (2006 was 37%, 2007 was 36%, 2008 was 38% and 2009 is 38%).

Of the children requiring social/emotional accommodations, most are affected by Attention Deficit Hyperactivity Disorder (ADHD) or Autism. While the percentage of children affected by Attention Deficit Hyperactivity Disorder (ADHD) is the same as last year (2007 was 10%, 2008 was 8%, and 2009 is 8%), the percentage of children with Autism increased from 13% in 2007 to 18% in 2008 and has decreased slightly (17%) this year.
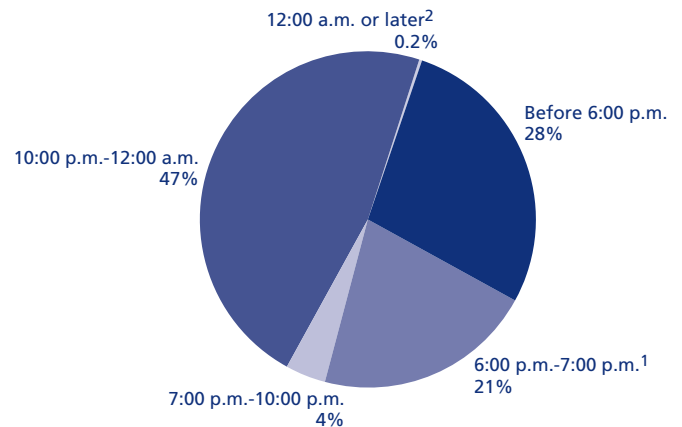
ed

Approximately 20% of caregivers are licensed to offer evening or overnight care.

Child Care Providers and Programs Licensed to Provide Day, Evening and Overnight Care

Providers and programs licensed for overnight care – 1%

Providers and programs licensed for evening care – 19%

Providers and programs licensed for traditional hours only – 80%
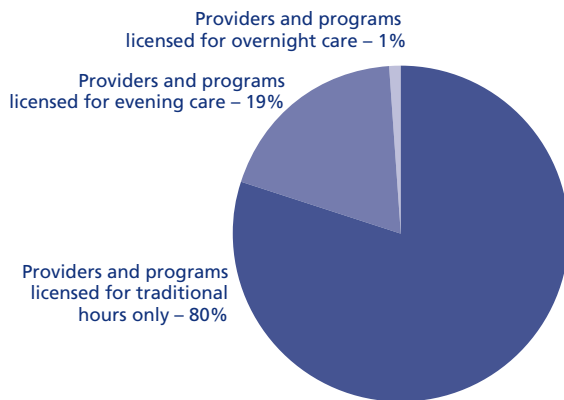
Closing Hours of Providers and Programs Licensed to Provide Evening or Overnight Care*

12:00 a.m. or later[2]
0.2%

Before 6:00 p.m.
28%

10:00 p.m.-12:00 a.m.
47%

6:00 p.m.-7:00 p.m.[1]
21%

7:00 p.m.-10:00 p.m.
4%

*Percentages do not equal 100% because of rounding.
[1] This is the defined time for the start of evening care.
[2] This is the defined time for the start of overnight care.

Of the caregivers that are licensed for evening or overnight care, about 48% actually offer non-traditional hours of care.

In fiscal year 2009, LOCATE: Child Care received requests for child care for 22,132 children. Of these requests, 6% (1,291) needed care during evening hours (6:00 p.m. to midnight), and 0.6% (129) needed care overnight (midnight to 6:00 a.m.). The percent of demands for evening care remained the same as last year while the percent of demands for overnight care showed a very slight decrease.
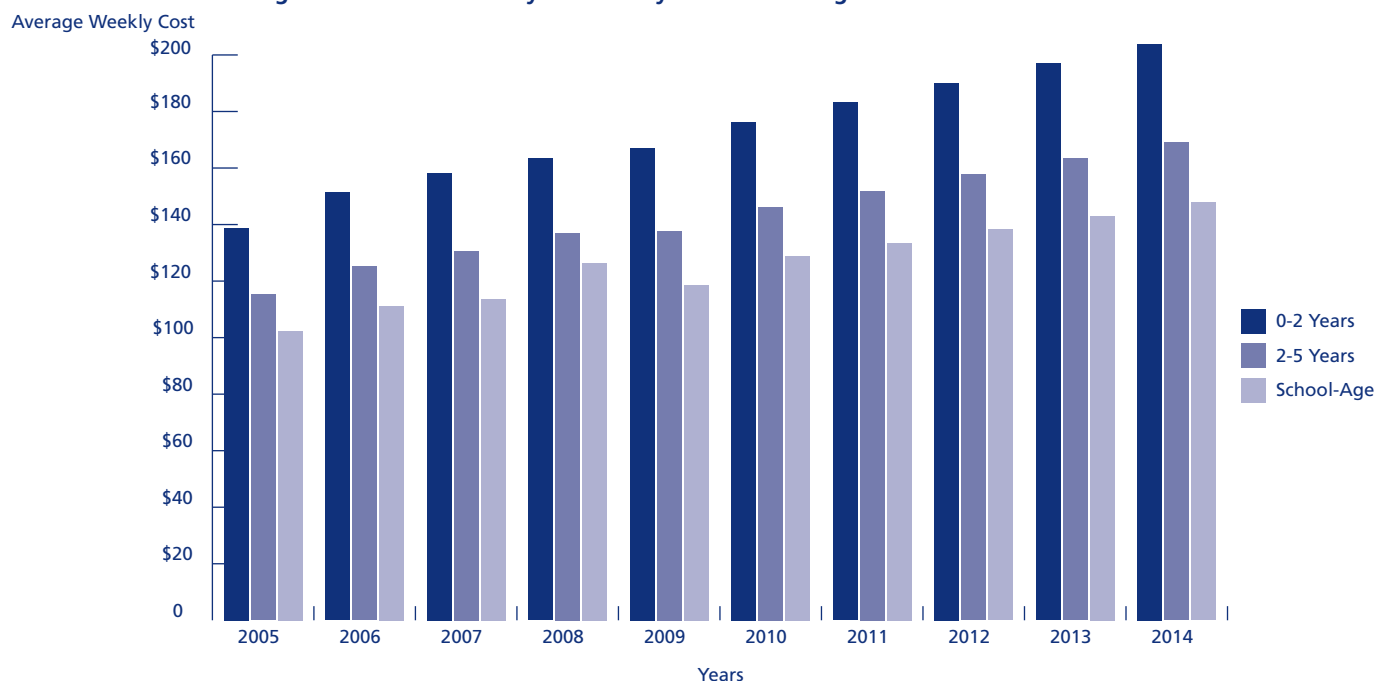
Will the cost of child care continue to grow?

The cost of care has shown, and will continue to show, general growth.

Average Cost of Care in Maryland Center-Based Programs

Average Weekly Cost

Years

- 0-2 Years
- 2-5 Years
- School-Age
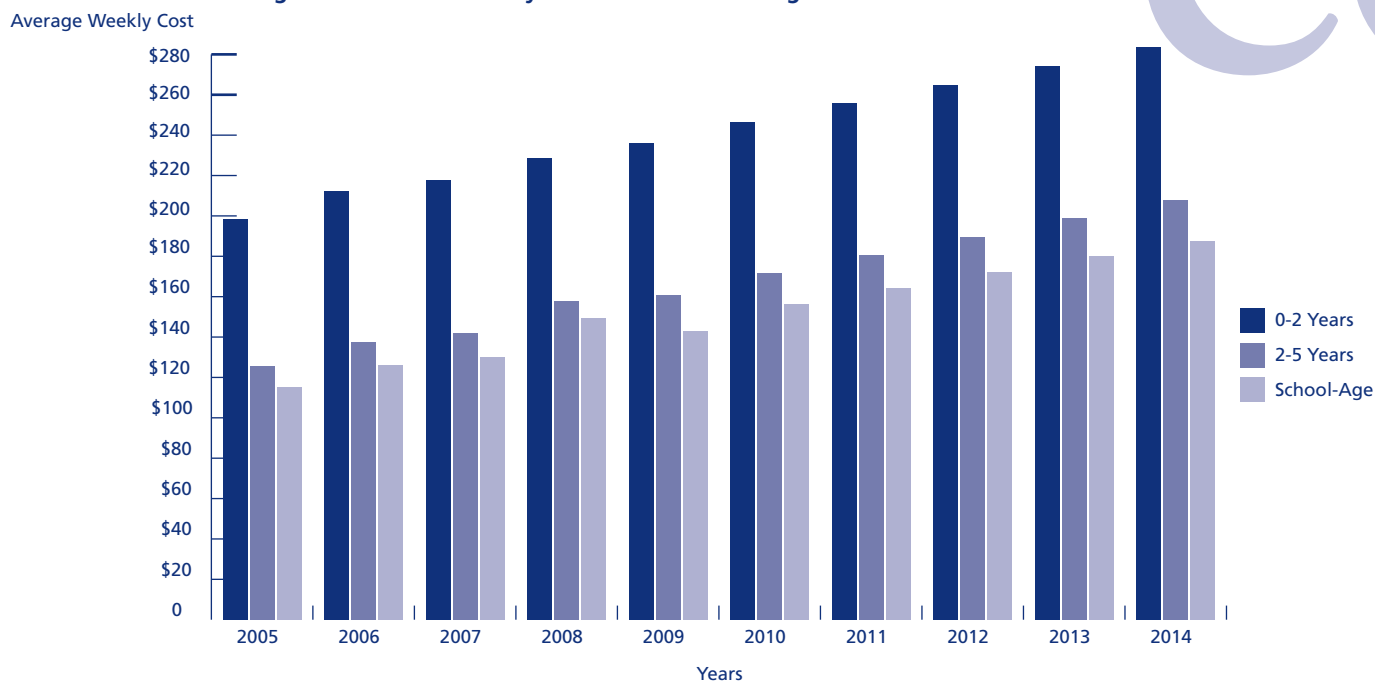
Average Cost of Care in Maryland Family Child Care Programs

Average Weekly Cost

Years

- 0-2 Years
- 2-5 Years
- School-Age

The charts above show actual and projected weekly costs of regulated child care in Maryland, grouped according to child age.

The charts include both the actual cost data collected to date and the projected future costs based on the trends of these data. Analyzing the cost data shows that all child care costs are projected to increase through 2014 from about 15% to 21% of this year's costs, depending on age and type of care.

The cost of care for children age birth to two is the highest for any age group and shows a projected growth in both types of programs – 16% for family child care and 15% for center-based programs. The cost of care for children age birth to two in center-based programs is the highest cost of any age group in either type of program.
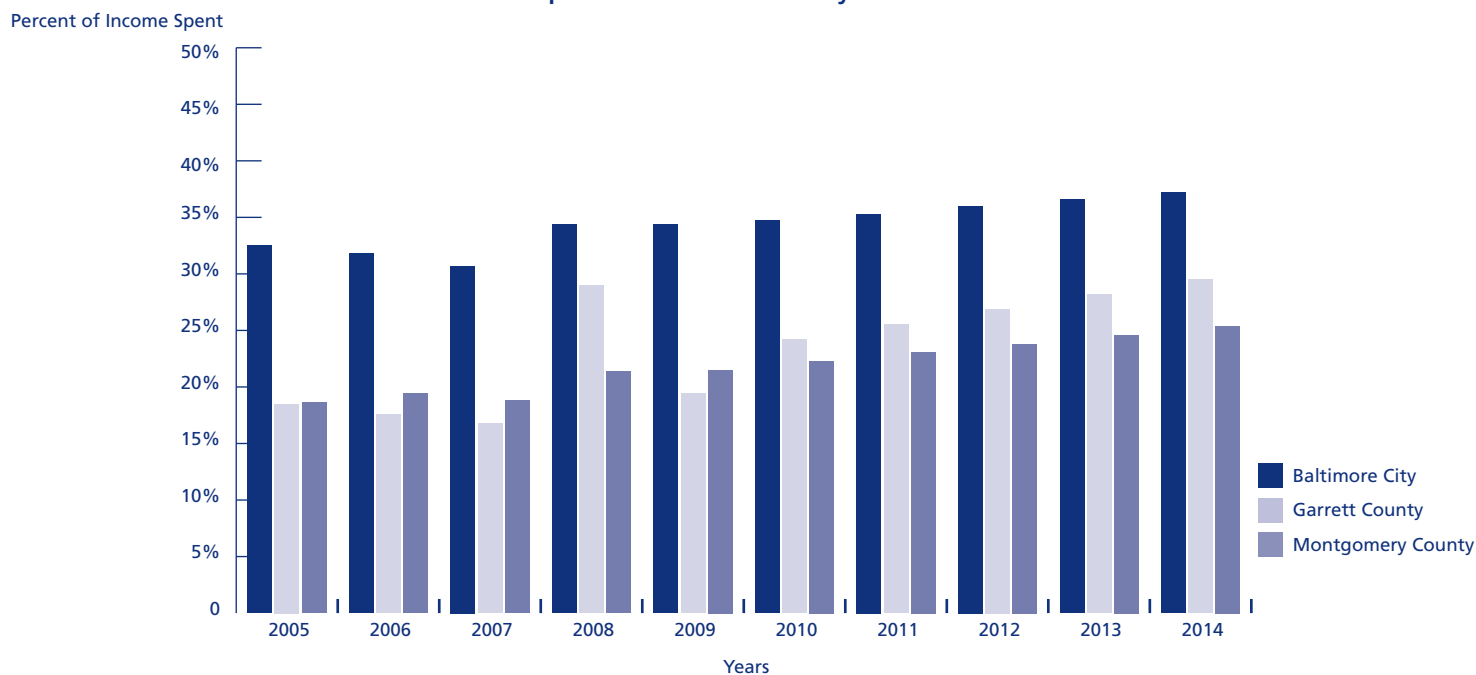
6

How much of a family's income is spent on child care?

st

The U.S. Department of Health and Human Services recommends that parents should not spend more than 10% of their family income on child care.

Percent of Median Income Spent on Child Care in Maryland

Percent of Income Spent

Legend:
- Baltimore City
- Garrett County
- Montgomery County

Years

The chart above shows the percentage of income that is spent on child care by a family using child care services and projects the spending requirements into the near future. There are three jurisdictions presented on the chart to represent three different population area types – an urban population (Baltimore City), a suburban population (Montgomery County), and a rural population (Garrett County).

The current expenditures are all above the recommended goal of 10%, and all three jurisdictions show a projected increase over the next five years. Based on these projections, none of the three areas is expected to meet the 10% goal by 2014.

What about the turnover rate among center-based child care staff?

33% of center-based staff left their positions during 2006.

Funding issues precluded a survey being accomplished this year to update these values.

In 2007, Maryland Committee for Children (MCC) conducted a survey of child care centers in the state to measure the extent of staff turnover. Responses were received from 372 of the centers. The workforce employed by the 372 responding centers numbered 4,116, as of January 1, 2006. In the ensuing year (January 1 through December 31, 2006), 1,357 members (33%) of this child care workforce left their positions.

The greatest turnover (42%) occurred in the teacher assistant/aide group. The director group had the least turnover.

Total Staff and Exiting Staff at Responding Child Care Centers

Staff Level	Number of employees at start of year	Number of employees that left during the year
Director	450	84 (19%)
Senior Staff/Group Leaders	1,977	555 (28%)
Teachers Assistant/Aide	1,689	718 (42%)
Total Staff	4,116	1,357 (33%)

Source: Survey conducted by Maryland Committee for Children, September 2007

What factors contribute to the turnover rate among center-based child care staff?

Compensation is the major factor affecting staff turnover.

In the survey cited above, responses from 159 centers (54% of those centers who responded to this question) indicated that compensation was a significant factor in the decision of employees to leave their jobs. Respondents were asked to indicate which aspects of compensation played a role in turnover. Wages ranked highest in this regard, followed by other concerns:

• 157 centers cited wages as an issue in turnover;

• 83 centers cited health benefits;

• 28 centers cited paid leave; and

• 24 centers cited various other concerns.

Not all staff turnover was attributed to compensation. Surveys from 138 centers (46% of those centers who responded to this question) reported that compensation was not a factor in turnover.[1] These centers cited various reasons for turnover including life cycle events such as marriage, pregnancy, employee's desire to stay home with their own children, returning to school, getting a degree and seeking other employment, moving, retirement, etc.

[1] *Twenty percent (20%) of responding centers did not answer the question regarding the relationship of compensation to turnover.*

What about the family child care provider turnover rate?

ver

12% of Maryland's licensed family child care providers left the profession last year.

This turnover rate is the same as the last two years and continues to be a source of concern. One outcome of high turnover is inconsistent care for children who are forced to change from one caregiver to another. In addition, high turnover creates a less-experienced child care workforce. In the year ending in June 2009, 71% of family child care providers sampled had been operating for more than three years with almost 39% in operation for more than nine years. Ten percent had been operating their business for less than one year, according to MCC data.

The provider turnover rate represents changes in the child care provider database due to providers being deleted (leaving the child care profession due to the provider's personal/family issues, burn-out, or career change) and new providers being added. The turnover rate is calculated as the number of family child care providers deleted from the database during the year divided by the sum of family child care providers at the start of the year plus the number of providers added during the year. There was a net loss of 167 family child care providers in Maryland between July 2008 and June 2009.

What attracts people to a career in family child care? What causes them to leave?

In 2009, MCC surveyed 212 new family child care providers. As shown below, their primary reasons for entering the child care profession were that they enjoy working with children and that they want to stay home with their own children.

In 2009, MCC also surveyed 250 family child care providers who were leaving the child care profession. As shown below, they were leaving the child care profession because they moved; they experienced burnout or retired or got a new job; or they couldn't attract enough children to make their child care business profitable.

Reasons New Family Child Care Providers Entered the Child Care Profession in Maryland

Enjoy working with children	30%
Stay at home with own children	47%
No quality child care for my children	.4%
Extra income	2%

Source: MCC/LOCATE: Child Care, July 2009.

Reasons Maryland Family Child Care Providers Leave the Child Care Profession

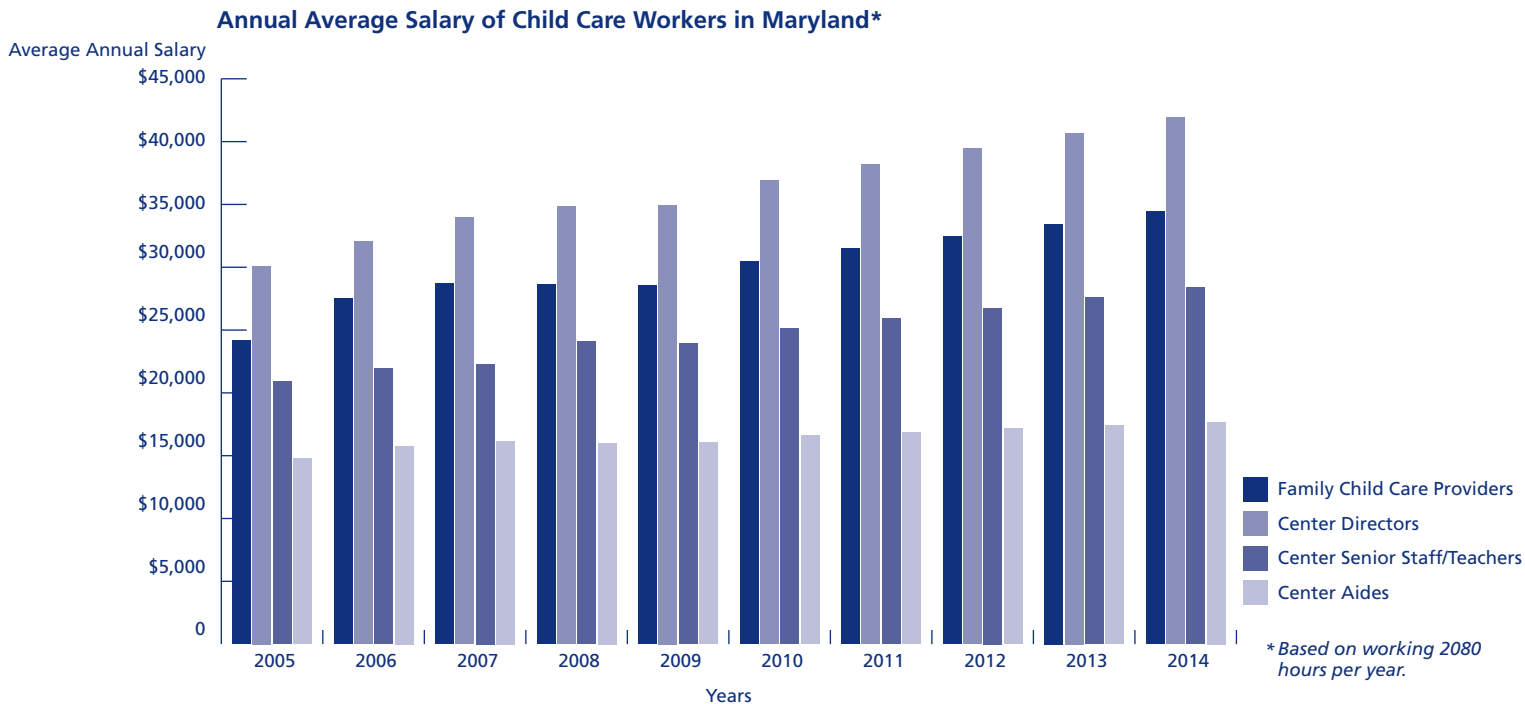|	
New job	13%
Retirement/Burnout	18%
Moved	16%
Not profitable	8%
Regulations	.4%

Source: MCC/LOCATE: Child Care, July 2009.
Percentages do not equal 100% because this is not a complete listing of reasons.

What are the average salaries of child care workers in Maryland?

compensation

The salaries of child care workers are low, when compared to other occupations – ranging between $7.70 and $16.76 per hour.

Annual Average Salary of Child Care Workers in Maryland*

Average Annual Salary

Years

Legend:
- Family Child Care Providers
- Center Directors
- Center Senior Staff/Teachers
- Center Aides

Based on working 2080 hours per year.

The chart above summarizes the salary growth of four categories of child care workers. Actual data, collected to the present date, is indicated as well as future projections based on these data. As depicted in the graph, the salaries of all child care workers show a general increase to date with continued projected growth.

Other surveys of child care wages support these data and projections. *Fifty Cents on a Dollar: Child Care Compensation in Maryland* (1998) reports a range of hourly wages between $6.26 for center aides and $11.62 for center directors, while the National Child Care Staffing Study (1998 update) reports a range of $6.00 to $10.85 per hour for aides and teachers.

Based on current trends, by 2014, all average salaries are projected to grow by 10% to 20% of their 2009 level. The salaries of family child care providers is projected to continue its growth at a higher rate than center directors which will close the gap some over the next five years.

How can the quality of child care be improved?

quality

Over the past several years, programs, both at the state and national level, have been created to improve the quality of child care. These voluntary programs have been credited with developing criteria for improving both child care programs and the individuals working in the child care field. Participation in one of these programs provide recognition to those child care providers or programs that go beyond the requirements of state licensing and regulations.

Successfully meeting the established criteria for programs is recognized by awarding the program a status of "accredited". Likewise, meeting the criteria for individuals working in child care programs is recognized by awarding a status of "credentialed". Documentation of these efforts has been tracked for three years and the results are shown below.

Accredited Programs (by year)

	2006	2007	2008	2009	Growth 2006-2009
Family Providers	118	105	142	166	40%
Centers*	166	158	169	179	8%
School Age Programs	28	27	56	95	239%

Programs with Credentialled Personnel (by year)

	2006	2007	2008	2009	Growth 2006-2009
Family Providers	769	927	987	1121	46%
Centers*	380	421	476	588	55%
School Age Programs	101	98	106	141	40%

Examination of the charts above increases (some are significant increases) for most areas. Increased participation in these programs is imperative in improving the quality of child care in the state of Maryland.

*Only full day (8-12 hours) child care centers are included in this number.

Additional resources from Maryland Family Network

Child Care Demographics provides annual data for components of the child care system (demand, supply, cost, wages) for the state and separately for each of the 23 counties and the city of Baltimore.

Child Care and Early Education in Maryland 2005 provides a guide to the programs and resources in Maryland's child care system.

The Maryland Child Care Resource Network Training Calendar, published three times a year, provides a listing of training opportunities for child care providers statewide.

Child Care for Children with Special Needs reports on a survey, conducted in 2005, of child care providers relating to the availability and quality of child care for children with special needs.

Identifying Childhood Mental Illness: How Child Care Providers Can Help offers a checklist of behaviors that indicate the need for professional evaluation and suggests ways providers might discuss this with parents.

Young Children's Mental Health Policy Conference 2006 recaps the proceedings of conferences held in 2002, 2004, 2005, and 2006 including an assessment of and vision for mental health services for young children in Maryland.

Conversations on Curriculum reports on a conference held in January, 2002, which explored best practices in assessment and curricula in early childhood education. The full report and an executive summary are available on www.marylandfamilynetwork.org, under the section entitled "For Child Care Providers."

Family Child Care Providers in Maryland: A Profile presents data gathered in 2004/2005 on family providers and their programs.

LOCATE: Community Resources Assistant (also known as the Community Resource Database) is a service provided through the Maryland Child Care Resource Network and the Maryland Family Network. LOCATE: Community Resources Assistant provides information on resources available to the child care community, parents and families, and others. Maryland Family Network, 410-752-7588.

Information on after-school care, including user searches by county and neighborhood, is available at www.mdafterschool.org.

For other publications and information about child care in Maryland, visit the MFN website at www.marylandfamilynetwork.org.

Maryland Child Care Resource Network

Anne Arundel: Arundel Child Care Connections
77 West Street, Suite 300
Annapolis, MD 21401
Phone: 410.222.1712   LOCATE: 410.222.1728

Baltimore City: Baltimore City Child Care Resource Center
1645 Ridgely Street, Suite 200
Baltimore, MD 21230
Phone: 410.685.5150   LOCATE: 410.539.2209

Baltimore County: Child Care Links
1101 North Point Boulevard, Suite 112
Baltimore, MD 21224
Phone: 410.288.4900   LOCATE: 410.288.5600

Carroll: Child Care Choices
255 Clifton Boulevard, Suite 319
Westminster, MD 21157
Phone: 410.751.2917   LOCATE: 877.230.7422

Frederick: Child Care Choices
263 West Patrick Street
Frederick, MD 21701
Phone: 301.662.4549
Toll free: 800.753.6841   LOCATE: 301.695.4508
                                   or 877.230.7422

Harford/Cecil: Child Care Links of Harford and Cecil Counties
Emmorton Crossroads
2105 Laurel Bush Road, Suite 105
Bel Air, MD 21015
Phone: 443.512.0461   LOCATE: 888.244.5383

Howard: Howard County Child Care Resource Center
3300 North Ridge Road, Suite 380
Ellicott City, MD 21043
Phone: 410.313.1940   LOCATE: 410.313.1930

Lower Shore: Lower Shore Child Care Resource Center
East Campus Complex, Suite 500
Salisbury University
Power and Wayne Streets
Salisbury, MD 21804
Phone: 410.543.6650   LOCATE: 410.548.3279

Montgomery: Montgomery County Child Care
Resource and Referral Center
332 West Edmonston Drive
Rockville, MD 20852
Phone: 240.777.3110   LOCATE: 240.777.3130

Prince George's: Prince George's Child Resource Center
9475 Lottsford Road, Suite 202
Largo, MD 20774
Phone: 301.772.8420   LOCATE: 301.772.8400

Southern Maryland: Southern Maryland Child Care
Resource Center
29958 Killpeck Creek Court
Charlotte Hall, MD 20622
Phone: 301.290.0040
Toll free: 866.290.0040
In St. Mary's County   LOCATE: 301.290.0045
In Charles & Calvert Counties   LOCATE: 866.290.0045

Upper Shore: Chesapeake Child Care Resource Center
Chesapeake College, P.O. Box 8
1000 College Circle
Wye Mills, MD 21679
Phone: 410.822.5400, x346   LOCATE: 888.406.1453

Western Maryland: Apples for Children, Inc.
6 W. Washington Street, Suite 210
Hagerstown, MD 21740
Phone: 301.733.0000
In Allegany & Garrett Counties LOCATE: 800.924.9188
In Washington County   LOCATE: 301.733.6914

Maryland Child Care Resource Network is a project of Maryland Family Network, the Maryland State Department of Education and Maryland's business community.

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This publication was produced by Maryland Family Network as a work for hire for the benefit of, and with funds from the Maryland State Department of Education.